Accounts

Summary:

The Accounts Screen was based upon the Account business component. Customization was necessary to meet the client's requirements. For the client's application, an account could be either a person or a company. Several new fields were created to facilitate the intake of all necessary Account information. One of these new fields, called "Reminders," shows error messages. This was necessary since pop-up message boxes are not supported in Thin Client. New picklists were created for several of the fields. The Account Entry applet was designed to mirror the Contact Entry applet, as most of the information will be duplicated. Siebel VB code was added to provide functionality not available in basic Siebel Tools configuration (see below for details). Two new views, Account Results and Account Partners, were added to the Accounts Screen. The Account Partner view filters the Account list based on the Account Type value of Partner. The Account Results view is based on the new Results Screen. All other views on this screen were copied from Siebel Vanilla, except for use of the name "Cases" instead of "Service Requests" and "Loans" instead of "Assets." The modified Loans view shows the detailed loan information associated with each account.

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A5-A8.

Picklists:

The following is a list of new picklists that were added for the OCTS 2.0 system.

- Suffix
- Contact Method

For a list of the values in these picklists, please refer to Appendix B3.

VB Code:

Code Summary:

Siebel VB code was written on the Account Business Component, under Bus_Comp_SetFieldValue. When the Account is a student, the Account field will be populated with the student's social security number and the Account Type field will be 'Customer.'

If the Account Type is 'Customer,' the code checks the length of the Account field, and if the length is 9, it will format the number as ###-##-####. If the length is not 9 digits, an error message is displayed in the Reminders field. The code also checks the length of the zip code, and if there are 4 extra digits, it will be formatted as #####-####. The email address fields may be populated with home page addresses.

The code will check to see whether or not the data is an email address or a homepage. If the data is a homepage, the format is checked. If the format is incorrect, a message will display in the Reminders field. When the Contact Method is chosen from the picklist, the code will verify that the field that matches the chosen contact method is populated. If it is not, then an error message is displayed in the Reminders field. When 1st email or 2nd email is chosen as the contact method, the code will verify that these fields are not empty, as well as the home phone number field.

For the actual VB Code, please refer to Appendix C2.

Charts:

Title: Number of Accounts by Account Type
Business Component: Account
Chart Summary: Displays number of accounts (Y) categorized by the account type (X).

Title: Number of Accounts by State
Business Component: Account
Chart Summary: Displays number of accounts (Y) categorized by the state where the account is from (X).